HR ACTION WORKSHEET INSTRUCTIONS

AGENCY NAME: Fill in the box for the appropriate agency. *HINT: to fill in the box, double-click on the box for the name. A pop-up menu will appear called "Check Box Form Field Options." Move cursor to Default Value and click on "Checked" and hit "OK."*
AGENCY CODE: Fill in the box for the appropriate agency code.
EFFECTIVE DATE: The effective date of the action being requested.

COMPLETE THE ENTIRE HR ACTION WORKSHEET FOR THE ACTIONS LISTED BELOW

Fill in the box for the Pay Action requested:

Starting Pay	Promotion
Voluntary Demotion	Voluntary Transfer
Competitive Salary Offer: COPY OF OFFER LETTER MUST BE ATTACHED.	Disciplinary or Performance-Related Demotion: ATTACH WRITTEN NOTICE.
Sign-On Bonus	Recognition Bonus
Role Change: EWP MUST BE ATTACHED.	In-Band Adjustment: EWP MUST BE ATTACHED FOR "CHANGE IN DUTIES." FOR "APPLICATION OF NEW KNOWLEDGE…." APPROPRIATE DOCUMENTATION MUST BE ATTACHED.
In-Band Bonus	Temporary Pay/Remove Temporary Pay

For definitions of the above Pay Actions please refer to:
http://intranet/dsa/hr/Compensation/DSAPayPracticesManual.doc

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COMPLETE *ONLY PAGE ONE* OF THE HR ACTION WORKSHEET FOR THE ACTIONS BELOW

Resign: RESIGNATION LETTER WITH NOTATION OF SUPERVISOR APPROVAL MUST BE ATTACHED.	Retire
Terminate	Transfer to another state agency: RESIGNATION LETTER WITH NOTATION OF SUPERVISOR APPROVAL MUST BE ATTACHED.
Lay-Off	Suspend/ Return from Suspension: WRITTEN NOTICE MUST BE ATTACHED.
LWOP/ Return from LWOP: ATTACH COPY OF LEAVE SLIPS.	STD/ Return from STD
LTD	Recruit: ATTACH AHR, EWP, DRAFT AD if appropriate
Funding Code Changes: USE THE "CURRENT OR OLD POSITION FUNDING" AND THE "NEW OR REVISED POSITION FUNDING" FIELDS ON PAGE ONE.	VIB Only: THIS IS USED FOR VIRGINIA INDUSTRIES FOR THE BLIND EMPLOYEES. CHECK APPROPRIATE BOX AND THEN FILL OUT THE RELEVANT INFORMATION ON THE REST OF PAGE ONE.
Establish position: CHECK ALL BOXES. ATTACH EWP & ORGANIZATIONAL CHART. FILL IN THE NEW ROLE TITLE, PAY BAND, NEW OR REVISED FUNDING, ORGANIZATIONAL UNIT, AND LOCATION CODE ON PAGE ONE.	FLSA: THE POSITIONS' FLSA DESIGNATION. PLEASE REFER TO: Fair Labor Standards Act (FLSA) TO FIND THE CORRECT DESIGNATION.

HR ACTION WORKSHEET INSTRUCTIONS

FIELD DEFINITIONS FOR PAGE ONE

- **EMPLOYEE NAME**: Name of employee in the position.
- **EMPLOYEE ID NUMBER**: <u>current</u> employees only.
- **SOCIAL SECURITY NUMBER**: <u>new</u> employees only.
- **DATE OF BIRTH**: <u>new</u> employees only.
- **RACE**: new employees only. Fill in the box for the appropriate race designation. Click this address for Race Designations:
  http://intranet/dsa/hr/downloads/SupervisorsGuidelinesForHiring092008.doc
- **GENDER:** Fill in the box for the appropriate gender.
- **CURRENT POSITION #:** Employee's current position number.
- **CURRENT ROLE TITLE/ROLE CODE and CURRENT PAY BAND:** Click this address for Role Titles, Role Codes, and Pay Bands:
  http://www.dpt.state.va.us/compensation/careergroups/cgdlist.html
- **NEW POSITION #:** this is the position number the employee is being hired, promoted, transferred, or demoted into.
- **NEW ROLE TITLE/ROLE CODE and NEW PAY BAND:** Employee's new role title and role code. Click this address for Role Titles, Role Codes, and Pay Bands:
  http://www.dpt.state.va.us/compensation/careergroups/cgdlist.html
- **CURRENT WORK TITLE or NEW WORK TITLE**: working title in current or new position.
- **CURRENT ORGANIZATIONAL UNIT AND LOCATION CODE or NEW ORGANIZATIONAL UNIT AND LOCATION CODE:**   employee's current or new organizational unit; e.g., FRS-Roanoke. Location codes are three-digit codes and can be found at the following address: http://intranet/dsa/hr/
- **CURRENT OR PREVIOUS SALARY:** employee's current salary or if this is a new employee, their previous salary.
- **NEW SALARY:** Employee's new salary. If the employee is classified show salary as the annual rate. If the employee is wage, show salary as the hourly rate.
- **CURRENT OR OLD POSITION FUNDING:** Funding information can be found at this address: http://intranet/dsa/fiscal/COAReports/Reports/ChartofAccountReport.aspx
- **NEW OR REVISED POSITION FUNDING:** Funding information can be found at this address: http://intranet/dsa/fiscal/COAReports/Reports/ChartofAccountReport.aspx
- **PERCENTAGE OF INCREASE OR DECREASE REQUESTED:** This is the amount of the increase or decrease from the current or previous salary.   If no increase, just show "0%."
- **BONUS AMOUNT:** this is reflected as a lump sum amount.
- **SALARY VERIFICATION:** Previous salary should always be verified. Go to the following address for tips on verifying salaries:
  http://intranet/dsa/hr/downloads/SupervisorsGuidelinesForHiring092008.doc

HR ACTION WORKSHEET INSTRUCTIONS

- **STATE PHONE NUMBER:** Employee's work phone number. **REQUIRED** for new hires, transfers, promotions, demotions, or if change in number has occurred.
- **CELL PHONE NUMBER:** If employee has a state-issued cell phone, include the cell phone number and the carrier. **REQUIRED** for new hires, transfers, promotions, demotions, or if change in number has occurred or employee has just received a state-issued cell phone.
- **PAGER OR PDA NUMBER:** If employee has a state-issued pager or PDA number. Check the appropriate carrier. **REQUIRED** for new hires, transfers, promotions, demotions, or if change in number has occurred or employee has just received a state-issued page or PDA.
- **ADDITIONAL INFORMATION/EXPLANATION:** Use this field for any additional information, not covered in other parts of the form.

FIELD DEFINITIONS FOR PAGE TWO

This page includes the pay factors are used to justify the salary action. ALL pay factors must be considered but only those factors that are relevant need to be completed.

For definitions of the pay factors, please refer to:
http://intranet/dsa/hr/Compensation/DSAPayPracticesManual.doc